DII EPMO – Project Deliverables Matrix

Deliverable / Artifact	Required Project Tracks														
	Light					Classic					Robust				
	Explore	Initiate	Plan	Execute	Close	Explore	Initiate	Plan	Execute	Close	Explore	Initiate	Plan	Execute	Close
EXPLORE															
IT –ABC Form	С					С					С				
INITIATE															
Scope Statement		PM													
Abbreviated Charter							PM								
<u>Charter</u>												PM			
<u>Project Log – Test Cases</u>		PM					PM					PM			
Project Log - ChangeLog							PM					PM			
<u>Project Log – Action Items</u>							PM					PM			
<u>Project Log – Issues</u>							PM					PM			
<u>Project Log – Busget</u>							PM					PM			
Project Log – RACI												PM			
Project Log – Risk Log												PM			
PLAN															
<u>Project Log – Requirements</u>			PM					PM					PM		
MS Project Schedule			PM					PM					PM		
Communications Matrix								PM					PM		
Communication Management Plan													PM		
Project Management Plan													PM		
Implementation Plan													PM		
EXECUTE															
Summary Status Report				PM					PM						
Detailed Status Report														PM	
Meeting Agenda and Discussion Log									PM					PM	
Test Plan									PM					PM	
Change Request									PM					PM	
CLOSE															
Final/formal Acceptance *										PM					PM
Customer Satisfaction Survey										PM					PM
<u>Lessons Learned</u>										PM					PM
I agand:															

Legend:

✓ C: Customer

✓ **BA:** Business Analyst ✓ PM: Project Manager

Formal Acceptance is completed for deliverables anytime throughout project process.

DII EPMO - Situationally Optional Deliverables

Situationally Optional	Situationally Optional - Project Tracks														
Deliverables		I	∠igh	t		Classic					Robust				
	Explore	Initiate	Plan	Execute	Close	Explore	Initiate	Plan	Execute	Close	Explore	Initiate	Plan	Execute	Close
Optional EXPLORE															
Budget Request Form	С					С					С				
Cost Benefit Analysis	BA					BA					BA				
Optional INITIATE															
VISION Project Code Request		PM					PM					PM			
Optional PLAN															
Issue Management Plan								PM					PM		
Change Management Plan								PM					PM		
Business Impact Analysis													PM		
Abbreviated Requirements			BA					BA							
Detailed Requirements								BA					BA		
Business Requirements Report													BA		
Requirements Traceability Matrix			PM					PM					PM		
Scope Management Plan								PM					PM		
Detailed Design Document			EA					EA					EA		
Cost Estimate Summary			PM					PM					PM		
Detailed Effort and Cost Estimating													PM		
Std Cost Estimating Assumptions			BA					BA					BA		
Quality Management Plan													PM		
Quality Assurance Checklist													PM		
Human Resource Management Plan													PM		
Resource Requirements													PM		
Responsibility Matrix			PM					PM					PM		
Team Directory			PM					PM					PM		
Kickoff Meeting Log													PM		
Abbreviated Risk Management Plan								PM							
Risk Management Plan								PM					PM		
Risk Assessment Exercise													PM		
Risk Factors Checklist													PM		
Risk Identification Worksheet			PM					PM					PM		
SWOT Analysis Worksheet													PM		
Procurement Management Plan								PM					PM		
Service Level Agreement			PM					PM					PM		
RFP			PM					PM					PM		
QA Checklist for Outsourced Projects								PM					PM		
Statement of Work (SOW)			PM					PM					PM		
AA-14			PM					PM					PM		
Sole Source Justification			PM					PM					PM		
Deliverable Management Process								PM					PM		
Optional EXECUTE															

DII EPMO - Situationally Optional Deliverables

Sesue Submission Form	Issue Log		PM			PM			PM	
Change Control Log PM PM PM Change Request Form PM PM PM Budget Log PM PM PM Acceptance Criteria PM PM PM Test Case Matrix PM PM PM Action Item Log PM PM PM Risk Submission Form PM PM PM Risk Tracking Log PM PM PM Independent Review Soft PM PM PM Vender Presentation Rating PM PM PM Vendor Proposal Rating PM PM PM Abbreviated Vendor Reference PM PM PM Vendor Reference Check PM PM PM Confidentiality Agreement PM PM PM Non-disclosure Agreement PM PM PM PM PM PM PM PM Documentation Summary PM PM PM PM Closcou	Issue Submission Form									
Change Request Form PM PM PM Budget Log PM PM PM Acceptance Criteria PM PM PM Test Case Matrix PM PM PM Action Item Log PM PM PM Risk Submission Form PM PM PM Risk Tracking Log PM PM PM Independent Review SOW PM PM PM Vender Presentation Rating PM PM PM Vendor Proposal Rating PM PM PM Abbreviated Vendor Reference PM PM PM Vendor Reference Check PM PM PM Confidentiality Agreement PM PM PM Non-disclosure Agreement PM PM PM Optional CLOSE Documentation Summary PM PM Documentation Summary PM PM PM Closeout questions PM PM PM Closeout Report </td <td>Change Control Log</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Change Control Log									
Budget Log	Change Request Form									
Acceptance Criteria Test Case Matrix PM PM PM PM Action Item Log PM PM PM PM Risk Submission Form Risk Tracking Log PM PM PM PM Independent Review Summary PM PM PM Independent Review SOW PM PM PM PM Vender Presentation Rating PM PM PM PM Vender Presentation Rating PM PM PM PM PM Vendor Proposal Rating PM PM PM PM PM Vendor Proposal Rating PM	Budget Log									
PM										
Risk Submission Form Risk Tracking Log Risk Trac			PM			PM				
Risk Tracking Log Independent Review Summary Independent Review SOW Vender Presentation Rating Vendor Proposal Rating PM Abbreviated Vendor Reference PM Vendor Reference Check Confidentiality Agreement PM Non-disclosure Agreement PM	Action Item Log		PM			PM			PM	
Independent Review Summary Independent Review SOW Vender Presentation Rating Vendor Proposal Rating Abbreviated Vendor Reference Vendor Reference Check Confidentiality Agreement PM PM PM PM PM PM PM PM PM P	Risk Submission Form								PM	
Independent Review SOW Vender Presentation Rating Vendor Proposal Rating Abbreviated Vendor Reference Vendor Reference Check Confidentiality Agreement PM PM PM PM PM PM PM PM PM P	Risk Tracking Log								PM	
Vender Presentation Rating PM PM Vendor Proposal Rating PM PM Abbreviated Vendor Reference PM PM Vendor Reference Check PM PM Confidentiality Agreement PM PM Non-disclosure Agreement PM PM Optional CLOSE PM PM Documentation Summary PM PM Closeout questions PM PM Closeout Report PM PM Completion Checklist PM PM Phase Acceptance PM PM Phase Gate 0 Checklist PM PM Phase Gate 1 Checklist PM PM Phase Gate 2 Checklist PM PM Phase Gate 3 Checklist PM PM Phase Gate 4 Checklist PM PM Phase Gate 4 Checklist PM PM Phase Gate 4 Checklist PM PM Phase Gate 5 Checklist PM PM Phase Gate 5 Checklist PM PM Phase Gate 6 Checklist PM PM	Independent Review Summary					PM			PM	
Vendor Proposal Rating PM PM Abbreviated Vendor Reference PM PM Vendor Reference Check PM PM Confidentiality Agreement PM PM Non-disclosure Agreement PM PM Optional CLOSE PM PM Documentation Summary PM PM Closeout questions PM PM Closeout Report PM PM Completion Checklist PM PM Phase Acceptance PM PM Phase Gate 0 Checklist PM PM Phase Gate 1 Checklist PM PM Phase Gate 2 Checklist PM P Phase Gate 3 Checklist PM P Phase Gate 4 Checklist PM P Support Transition Plan PM P Customer Review PM PM Peer Review PM PM Project Scorecard PM P	Independent Review SOW					PM			PM	
Abbreviated Vendor Reference Vendor Reference Check Confidentiality Agreement PM PM PM PM PM PM PM PM PM P	Vender Presentation Rating					PM			PM	
Vendor Reference Check PM PM<	Vendor Proposal Rating					PM			PM	
Confidentiality Agreement PM PM PM Non-disclosure Agreement PM PM PM Optional CLOSE Documentation Summary PM PM Closeout questions PM PM PM Closeout Report PM PM PM Completion Checklist PM PM PM Phase Acceptance PM PM PM Phase Gate 0 Checklist PM PM PM Phase Gate 1 Checklist PM PM PM Phase Gate 2 Checklist PM PM PM Phase Gate 3 Checklist PM PM PM Phase Gate 4 Checklist PM PM PM Phase Gate 4 Checklist PM PM PM Support Transition Plan PM PM PM Customer Review PM PM PM Peer Review PM PM PM Project Scorecard PM PM PM	Abbreviated Vendor Reference					PM				
Non-disclosure Agreement PM PM PM Optional CLOSE Documentation Summary PM PM PM Closeout questions PM PM PM PM Closeout Report PM PM PM PM Completion Checklist PM PM P Phase Acceptance PM PM P Phase Gate 0 Checklist PM P Phase Gate 1 Checklist PM P Phase Gate 2 Checklist PM P Phase Gate 3 Checklist PM P Phase Gate 4 Checklist PM P Pub Support Transition Plan PM P Customer Review PM PM Peer Review PM P Project Scorecard PM P	Vendor Reference Check								PM	
Optional CLOSE Documentation Summary PM PM PP Closeout questions PM <	Confidentiality Agreement		PM			PM			PM	
Optional CLOSE Documentation Summary PM PP Closeout questions PM PM PM Closeout Report PM PM PP Completion Checklist PM PM P Phase Acceptance PM PM P Phase Gate 0 Checklist PM P P Phase Gate 1 Checklist PM P P Phase Gate 2 Checklist PM P P Phase Gate 3 Checklist PM P P Phase Gate 4 Checklist PM P P Support Transition Plan PM P P Customer Review PM P P Peer Review PM P P Project Scorecard PM P P	Non-disclosure Agreement		PM			PM			PM	
Closeout questions Closeout Report Completion Checklist PM Phase Acceptance Phase Gate 0 Checklist PM Phase Gate 1 Checklist PM Phase Gate 2 Checklist PM Phase Gate 3 Checklist PM Phase Gate 4 Checklist PM Phase Gate 4 Checklist PM Phase Gate 5 Checklist PM Phase Gate 6 Checklist PM Phase PM P	Optional CLOSE									
Closeout Report PM PM P Completion Checklist PM P Phase Acceptance PM P Phase Gate 0 Checklist PM P Phase Gate 1 Checklist PM P Phase Gate 2 Checklist PM P Phase Gate 3 Checklist PM P Phase Gate 4 Checklist PM P Support Transition Plan PM P Customer Review PM P Peer Review PM P Project Scorecard P P	Documentation Summary						PM			PM
Closeout Report PM P Completion Checklist PM P Phase Acceptance PM P Phase Gate 0 Checklist PM P Phase Gate 1 Checklist PM P Phase Gate 2 Checklist PM P Phase Gate 3 Checklist PM P Phase Gate 4 Checklist PM P Support Transition Plan PM P Customer Review PM P Peer Review PM P Project Scorecard PM P	Closeout questions			PM			PM			PM
Phase Acceptance PM P Phase Gate 0 Checklist PM P Phase Gate 1 Checklist PM P Phase Gate 2 Checklist PM P Phase Gate 3 Checklist PM P Phase Gate 4 Checklist PM P Support Transition Plan PM P Customer Review PM P Peer Review PM P Project Scorecard PM P	Closeout Report									PM
Phase Acceptance PM Phase Gate 0 Checklist PM Phase Gate 1 Checklist PM Phase Gate 2 Checklist PM Phase Gate 3 Checklist PM Phase Gate 4 Checklist PM Support Transition Plan PM Customer Review PM Peer Review PM Project Scorecard PM	Completion Checklist						PM			PM
Phase Gate 0 Checklist PM P Phase Gate 1 Checklist PM P Phase Gate 2 Checklist PM P Phase Gate 3 Checklist PM P Phase Gate 4 Checklist PM P Support Transition Plan PM P Customer Review PM P Peer Review PM P Project Scorecard PM P	Phase Acceptance						PM			PM
Phase Gate 1 Checklist PM P Phase Gate 2 Checklist PM P Phase Gate 3 Checklist PM P Phase Gate 4 Checklist PM P Support Transition Plan PM P Customer Review PM P Peer Review PM P Project Scorecard P P	Phase Gate 0 Checklist									PM
Phase Gate 2 Checklist PM P Phase Gate 3 Checklist PM P Phase Gate 4 Checklist PM P Support Transition Plan PM P Customer Review PM P Peer Review PM P Project Scorecard P P	Phase Gate 1 Checklist									PM
Phase Gate 3 Checklist PM P Phase Gate 4 Checklist PM P Support Transition Plan PM P Customer Review PM P Peer Review PM P Project Scorecard P P	Phase Gate 2 Checklist						PM			PM
Support Transition Plan PM P Customer Review PM P Peer Review PM P Project Scorecard P P	Phase Gate 3 Checklist									PM
Customer Review PM P Peer Review PM P Project Scorecard P P	Phase Gate 4 Checklist						PM			PM
Peer Review PM P Project Scorecard P P	Support Transition Plan						PM			PM
Project Scorecard P	<u>Customer Review</u>						PM			PM
	Peer Review						PM			PM
End of Project Metrics P	Project Scorecard									PM
	End of Project Metrics									PM
,										